

Office of the
Legislative Fiscal Analyst

FY 2002 Budget Recommendations

Joint Appropriations Subcommittee for
Public Education

Utah State Office of Education

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1.0 Summary: Utah State Office of Education

The Utah Constitution places the responsibility for the general control and supervision of the public school system with the State Board of Education which then appoints the State Superintendent. The State Superintendent administers the Utah State Office of Education (USOE). The State Board of Education, which is also the Utah State Board of Applied Technology Education, has under its control and supervision a number of Legislative funded entities. These include the Utah State Office of Education; Utah State Office of Rehabilitation; Utah Schools for the Deaf and the Blind; the Minimum School Program; School Building Programs; Child Nutrition (School Lunch Program); Applied Technology Education; Fine Arts and Science; and Educational Contracts. This budget (Utah State Office of Education) includes only those programs that relate to services and functions provided by the Office itself. The Analyst recommends an appropriation of \$151,857,900 for the Utah State Office of Education. This budget includes \$3,700,600 of Uniform School Funds that have been transferred from the Minimum School Program. This transfer is spending that occurs at the State Office of Education.

	Analyst FY 2002	Analyst FY 2002	Analyst FY 2002
Financing	Base	Changes	Total
Uniform School Fund	15,426,700	3,700,600	19,127,300
Federal Funds	126,339,700		126,339,700
Dedicated Credits Revenue	4,964,600		4,964,600
Federal Mineral Lease	663,000		663,000
GFR - Substance Abuse Prevention	399,500		399,500
USFR - Professional Practices	79,100		79,100
Transfers	(300)		(300)
Transfers - Interagency	285,000		285,000
Beginning Nonlapsing	4,239,100		4,239,100
Closing Nonlapsing	(4,239,100)		(4,239,100)
Total	\$148,157,300	\$3,700,600	\$151,857,900
Programs			
Board of Education	873,200		873,200
Instructional Services	111,101,500	200,600	111,302,100
Agency Support	4,560,000		4,560,000
Planning and Project Services	15,640,000	3,500,000	19,140,000
Applied Technology Education	15,982,600		15,982,600
Total	\$148,157,300	\$3,700,600	\$151,857,900
FTE/Other			
Total FTE	212		212

2.0 Issues: Utah State Office of Education

2.1 Response to FY 2001 Intent Language USOE Program Budget Overviews

It is the intent of the Legislature that the Departments of Health and Human Services, the Division of Employment Development in the Department of Workforce Services, and the State Office of Education work jointly through the regular budget process to present program budget overviews for services to people with disabilities and for services to the aging to be presented to the 2001 Health and Human Services Appropriations Subcommittee. These program budget overviews will include a discussion of the most appropriate and least costly funding options.

Analyst Response:

During the interim, public education officials developed materials in response to this intent language. The results are found behind Appendix A.

2.2 Response to FY 2001 Intent Language Education Summit Meeting

It is the intent of the Legislature to host an educational summit of key legislators involved with funding for education to discuss current adequacy and future needs for state funding for public education.

Analyst Response:

During the interim, Key Legislators held a summit in June 2000 to discuss educational issues and funding. The State Office of Education hosted this summit.

2.3 Task Force on Learning Standards and Accountability

The Legislature created the Task Force on Learning Standards and Accountability to convene during the 2000 interim. The task force heard testimony from public education officials and other professionals. After deliberations the task force drafted Senate Bill 28 “Utah Performance Assessment for Students Amendments”. This bill modifies provisions related to the State System of Public Education to address issues related to the Utah Performance Assessment System for Students (U-PASS). The bill expands the categories for disaggregating student performance data to include limited English proficiency. The bill requires each local school board to provide its staff with a professional development program to effectively implement and maintain U-PASS at the school and classroom levels. The bill requires additional data to be reported on the annual school performance report on issues related to reading proficiency, student absenteeism, staff qualifications, average daily attendance, and disaggregated enrollment totals. The bill also requires electronic reporting of additional data related to test scores and trends, grade averages, volunteerism, student discipline, and fee waivers.

A time line for implementation of Assessment and Accountability is provided in Appendix A. Future funding will be determined by the Legislature.

2.4 District Computer Services/Student Information System 2000+ Programmer

The Utah State Office of Education has a Computerized Student Record System in place. It has become the main student record keeping system for 17 districts, the Deaf and Blind schools, and 3 charter schools. Currently there are 255 outstanding programming requests. In addition the legislative mandate for new accountability information is required. Before data can be gathered, the system will have to be modified. The USOE has been paying a contract programmer. The Legislature will decide whether the State Office of Education will hire a full-time employee for this work. The Analyst recommends if funding becomes available, that \$76,200 be appropriated for this position.

2.5 Utah State Office of Education/School Districts Contractual Block Granting

The committee may wish to discuss appropriating funds to the school districts to contract with the Utah State Office of Education for services.

3.0 Programs: Utah State Office of Education

3.1 State Board of Education

Recommendation

The Analyst recommends \$873,200 for the State Board of Education. The Analyst's budget recommendation includes \$848,200 in Uniform School Fund Revenues. There are 15 board Members, along with the secretary/administrative assistant, and an internal auditor. The State Board of Education Program provides for the per diem, travel and other expenses of the board members of the State Board of Education. Each of the 15 board members receives direct salary compensation as well as benefits included in the State benefit plan. The State Board is the body that directs education and makes decisions on the rules governing educational policy and administration. The board has four standing committees. The committees are Board Executive and Audit; Administration, Finance, Strategic Planning and Legislation; Applied Technology and Rehabilitation; and Curriculum and Instruction. There are also 12 different advisory committees to the Board.

	2000	2001	2002	Est/Analyst
Financing	Actual	Estimated	Analyst	Difference
Uniform School Fund	1,018,300	852,400	848,200	(4,200)
Dedicated Credits Revenue	(190,100)	25,000	25,000	
Beginning Nonlapsing	647,200	298,700	298,700	
Closing Nonlapsing	(298,700)	(298,700)	(298,700)	
Total	\$1,176,700	\$877,400	\$873,200	(\$4,200)
Expenditures				
Personal Services	378,900	398,700	394,500	(4,200)
In-State Travel	16,600	16,600	16,600	
Out of State Travel	25,800	25,800	25,800	
Current Expense	476,900	340,300	330,100	(10,200)
DP Current Expense	30,000	30,000	30,000	
Other Charges/Pass Thru	248,500	66,000	76,200	10,200
Total	\$1,176,700	\$877,400	\$873,200	(\$4,200)
FTE/Other				
Total FTE	2	2	2	

3.2 Instructional Services

Recommendation

The Analyst recommends a total budget of \$111,302,100 for Instructional Services. The \$139,000 increase in Uniform School Funds is in part the result of funding transferred from the Minimum School Program for at-risk youth expenditures in the State Office. Instructional Services is by far the largest section in the State Office. It accounts for approximately 73 percent of the total budget.

The Division of Instructional Services provides leadership and support to local school districts, public and private schools, post-secondary educational institutions, parents, teachers, and educational agencies. The services provided are categorized into the sections of Curriculum and Services for At-Risk Students. The Instructional Services Division assists districts with individual subject planning and curriculum development. They are responsible for defining, developing, disseminating, and implementing the Core Curriculum Standards and other curriculum requirements of the State Board or the Legislature. There are specialists in areas such as Math, Science, Arts, Physical Education, Special Education, etc.

	2000	2001	2002	Est/Analyst
	Actual	Estimated	Analyst	Difference
Financing				
Uniform School Fund	3,844,000	4,431,100	4,570,100	139,000
Federal Funds	100,780,100	105,775,500	105,732,500	(43,000)
Dedicated Credits Revenue	101,700	100,000	98,200	(1,800)
Federal Mineral Lease	220,000	220,000	216,800	(3,200)
GFR - Substance Abuse Prevention	30,000	350,800	399,500	48,700
Transfers - Interagency	188,800	285,000	285,000	
Beginning Nonlapsing	333,300	681,000	681,000	
Closing Nonlapsing	(300,000)	(681,000)	(681,000)	
Total	\$105,197,900	\$111,162,400	\$111,302,100	\$139,700
Expenditures				
Personal Services	4,363,800	5,033,500	5,130,600	97,100
In-State Travel	116,700	116,700	116,700	
Out of State Travel	62,000	62,000	62,000	
Current Expense	2,180,600	2,180,600	2,173,800	(6,800)
DP Current Expense	321,500	321,500	321,500	
Other Charges/Pass Thru	98,153,300	103,448,100	103,497,500	49,400
Total	\$105,197,900	\$111,162,400	\$111,302,100	\$139,700
FTE/Other				
Total FTE	83	83	83	

3.3 Applied Technology Education

Recommendation The Analyst recommends a budget of \$15,982,600 for the Applied Technology Education Division of the USOE. The decrease in federal funds is a result of accounting differences between state and federal government fiscal years and funding estimates from the federal government.

The Applied Technology Education Division provides leadership and assistance to the 40 school districts, the five ATCs, and the three ATCSRs. The Division is responsible for setting standards for all ATE programs to assure students will receive quality Applied Technology training. The Division works with local employers to insure relevant training for students to provide skilled workers the employers need.

	2000	2001	2002	Est/Analyst
Financing	Actual	Estimated	Analyst	Difference
Uniform School Fund	2,421,200	2,421,300	2,383,100	(38,200)
Federal Funds	17,938,200	14,524,800	13,580,400	(944,400)
Dedicated Credits Revenue	(11,600)	20,000	19,400	(600)
GFR - Substance Abuse Prevention	320,800			
Transfers - Interagency	101,900			
Transfers			(300)	(300)
Beginning Nonlapsing	314,100			
Closing Nonlapsing	(381,000)			
Lapsing Balance	(7,800)			
Total	\$20,695,800	\$16,966,100	\$15,982,600	(\$983,500)
Expenditures				
Personal Services	2,307,800	2,327,400	2,272,700	(54,700)
In-State Travel	64,300	64,300	64,300	
Out of State Travel	17,600	17,600	17,600	
Current Expense	832,300	832,300	828,500	(3,800)
DP Current Expense	15,600	15,600	15,600	
DP Capital Outlay	5,600	5,600	5,600	
Other Charges/Pass Thru	17,452,600	13,703,300	12,778,300	(925,000)
Total	\$20,695,800	\$16,966,100	\$15,982,600	(\$983,500)
FTE/Other				
Total FTE	38	36	36	

3.4 Agency Services

The Analyst recommends a budget of \$4,560,000 for the Division of Agency Services.

The Division of Agency Services is responsible for providing the State Office of Education and the forty school districts with support in the areas of finance accounting, computer services, public relations, and personnel relations.

Uniform School Fund	3,799,500	4,047,600	3,970,000	(77,600)
Federal Funds	11,100	15,000	15,000	
Dedicated Credits Revenue	572,500	575,000	575,000	
Beginning Nonlapsing	175,000	175,000	175,000	
Closing Nonlapsing	(175,000)	(175,000)	(175,000)	
	<u>\$4,383,100</u>	<u>\$4,637,600</u>	<u>\$4,560,000</u>	<u>(\$77,600)</u>
Personal Services	2,799,700	3,046,500	2,977,800	(68,700)
In-State Travel	28,800	28,800	28,800	
Out of State Travel	30,100	30,100	30,100	
Current Expense	348,100	348,100	339,200	(8,900)
DP Current Expense	385,200	375,700	375,700	
DP Capital Outlay	301,300	301,300	301,300	
Other Charges/Pass Thru	489,900	507,100	507,100	
	<u>\$4,383,100</u>	<u>\$4,637,600</u>	<u>\$4,560,000</u>	<u>(\$77,600)</u>
Total FTE	46	48	48	

3.5 Planning and Project Services

The Analyst is recommending a budget of \$19,140,000.

The Division of Planning and Project Services provide leadership and support for local school districts, educators, and other education institutions. These services involve teacher licensing, teacher preparation program approval, Utah performance Assessment System for Students (U-PASS), legal consultation and support, educational equity and training, and fostering the State Strategic Plan within USOE and local school districts. Adult Education and new innovative programs such as charter schools, Goals 2000, and the Schools for the 21st Century are also responsibilities of this Division.

	2000	2001	2002	Est/Analyst
Financing	Actual	Estimated	Analyst	Difference
Uniform School Fund	3,701,500	4,251,500	7,355,900	3,104,400
Federal Funds	6,171,800	7,017,000	7,011,800	(5,200)
Dedicated Credits Revenue	4,099,200	4,150,000	4,247,000	97,000
Federal Mineral Lease	519,000	451,800	446,200	(5,600)
Restricted Revenue	57,500	75,000		(75,000)
USFR - Professional Practices			79,100	79,100
Transfers		3,500,000		(3,500,000)
Beginning Nonlapsing	3,071,100	3,128,000	3,084,400	(43,600)
Closing Nonlapsing	(3,128,000)	(3,128,000)	(3,084,400)	43,600
Total	\$14,492,100	\$19,445,300	\$19,140,000	(\$305,300)
Expenditures				
Personal Services	2,740,100	2,651,100	2,593,300	(57,800)
In-State Travel	34,700	34,700	34,700	
Out of State Travel	25,700	25,700	25,700	
Current Expense	2,601,000	3,208,400	3,005,500	(202,900)
DP Current Expense	135,100	135,100	135,100	
DP Capital Outlay	22,700	286,700	286,700	
Other Charges/Pass Thru	8,932,800	13,103,600	13,059,000	(44,600)
Total	\$14,492,100	\$19,445,300	\$19,140,000	(\$305,300)
FTE/Other				
Total FTE	35	43	43	

3.6 Internal Service Fund

The Analyst recommends an appropriation of \$1,018,900 for the Internal Service Fund.

The Internal Service Fund budget is for the USOE to operate the print shop and mailroom. It is funded entirely through Dedicated Credits depending on different USOE division use. Attached are the Internal Service Fund rates.

The Legislature needs to approve the rates that generate the revenue for this fund. In addition the Legislature needs to approve the number of FTEs and Capital Outlay that will be funded. The Analyst recommends the Legislature approve 8 FTE.

	2000	2001	2002	Est/Analyst
Financing	Actual	Estimated	Analyst	Difference
Dedicated Credits - Intragovernmental Revenue	1,058,200	1,091,500	1,018,900	(72,600)
Beginning Nonlapsing	(56,700)	(26,100)		26,100
Closing Nonlapsing	26,100			
Total	\$1,027,600	\$1,065,400	\$1,018,900	(\$46,500)
Expenditures				
Personal Services	258,200	295,800	229,700	(66,100)
In-State Travel	200	200	200	
Current Expense	695,800	695,800	715,400	19,600
DP Current Expense	5,200	5,200	5,200	
Capital Outlay	17,300	17,300	17,300	
Other Charges/Pass Thru	50,900	51,100	51,100	
Total	\$1,027,600	\$1,065,400	\$1,018,900	(\$46,500)
FTE/Other				
Total FTE	8	8	8	

The Analyst also recommends the Legislature approve the following rates.

Printing:	\$17.00 per hour labor
	.04 per copy
	Cost plus 35 percent on supplies
Mail Room:	Cost plus 25 percent

3.7 Programs: Office of the Superintendent - Indirect Cost Pool

The Analyst recommends a budget of \$3,679,200 and 47.0 FTEs and capital outlay budget authority up to \$71,300. These funds are all Interdepartmental Transfers.

The indirect cost pool funds those programs and individuals who operate the USOE. It is the central core for most of the education programs and it is the liaison with both the State and federal government. It is not directly funded from Uniform School Funds, but rather takes a portion of the total funds from all federal and state funds. They also serve as the accounting, budgeting and purchasing arm for the USOE.

The Legislature needs to approve the cost pool rates that generate the revenue for this fund. In addition the Legislature needs to approve the number of FTEs and Capital Outlay that will be funded by this pool. The Analyst recommends the Legislature approve 47.0 FTE, and \$71,300 for Capital Outlay. The Analyst also recommends that the Legislature approve the rate of 17.5 percent for Non-Restricted Funds and 10 percent for Restricted Funds.

	2000	2001	2002	Est/Analyst
Financing	Actual	Estimated	Analyst	Difference
Transfers	3,525,900	3,685,700	3,679,200	(6,500)
Beginning Nonlapsing	413,100	422,600	422,600	
Closing Nonlapsing	(422,600)	(422,600)	(422,600)	
Total	\$3,516,400	\$3,685,700	\$3,679,200	(\$6,500)
Expenditures				
Personal Services	2,756,200	2,875,900	2,869,500	(6,400)
In-State Travel	10,100	10,200	10,200	
Out of State Travel	15,400	15,400	15,400	
Current Expense	434,400	436,100	436,000	(100)
DP Current Expense	238,500	276,800	276,800	
DP Capital Outlay	61,800	71,300	71,300	
Total	\$3,516,400	\$3,685,700	\$3,679,200	(\$6,500)
FTE/Other				
Total FTE	45	47	47	

Indirect Cost Pool	
Revenues:	\$3,679,200
FTE	47
Capital Outlay	\$71,300

4.0 Other Information: Tables**4.1 USOE Internal Service Funds and Indirect Cost Pool**

	1998	1999	2000	2001	2002
	Actual	Actual	Actual	Estimated	Analyst
Financing					
Dedicated Credits - Intragov. Rev.	901,400	1,197,300	1,058,200	1,091,500	1,018,900
Transfers	3,287,800	3,389,500	3,525,900	3,685,700	3,679,200
Beginning Nonlapsing	550,900	330,700	356,400	396,500	422,600
Closing Nonlapsing	(255,100)	(413,100)	(396,500)	(422,600)	(422,600)
Total	\$4,485,000	\$4,504,400	\$4,544,000	\$4,751,100	\$4,698,100
Programs					
ISF - USOE Internal Service Fund	3,291,700	3,382,700	3,516,400	3,685,700	3,679,200
ISF - USOE Indirect Cost Pool	1,193,300	1,121,700	1,027,600	1,065,400	1,018,900
Total	\$4,485,000	\$4,504,400	\$4,544,000	\$4,751,100	\$4,698,100
Expenditures					
Personal Services	2,685,700	2,904,600	3,014,400	3,171,700	3,099,200
In-State Travel	13,100	8,200	10,300	10,400	10,400
Out of State Travel	15,700	15,200	15,400	15,400	15,400
Current Expense	1,281,400	1,174,600	1,130,200	1,131,900	1,151,400
DP Current Expense	364,900	281,000	243,700	282,000	282,000
DP Capital Outlay	29,900	15,900	61,800	71,300	71,300
Capital Outlay	52,400	58,400	17,300	17,300	17,300
Other Charges/Pass Thru	41,900	46,500	50,900	51,100	51,100
Total	\$4,485,000	\$4,504,400	\$4,544,000	\$4,751,100	\$4,698,100
Net Operating Income	\$0	\$0	\$0	\$0	\$0
FTE/Other					
Total FTE	54	54	54	55	55

4.2 Tables: State Office of Education

	1998	1999	2000	2001	2002
Financing	Actual	Actual	Actual	Estimated	Analyst
Uniform School Fund	13,410,500	13,683,700	14,784,500	16,003,900	19,127,300
Federal Funds	91,042,500	103,463,300	124,901,200	127,332,300	126,339,700
Dedicated Credits Revenue	5,047,700	5,000,700	4,571,700	4,870,000	4,964,600
Federal Mineral Lease	685,900	607,900	739,000	671,800	663,000
Restricted Revenue			57,500	75,000	
GFR - Substance Abuse Prevention	293,000	307,300	350,800	350,800	399,500
USFR - Professional Practices	61,900	59,300			79,100
Transfers				3,500,000	(300)
Transfers - Interagency	211,900	291,400	290,700	285,000	285,000
Beginning Nonlapsing	3,748,400	4,753,400	4,540,700	4,282,700	4,239,100
Closing Nonlapsing	(4,664,800)	(4,540,700)	(4,282,700)	(4,282,700)	(4,239,100)
Lapsing Balance			(7,800)		
Total	\$109,837,000	\$123,626,300	\$145,945,600	\$153,088,800	\$151,857,900
Programs					
Board of Education	1,206,600	1,534,800	1,176,700	877,400	873,200
Instructional Services	75,712,600	80,083,500	105,197,900	111,162,400	111,302,100
Agency Support	4,303,800	4,279,700	4,383,100	4,637,600	4,560,000
Planning and Project Services	8,529,800	13,336,400	14,492,100	19,445,300	19,140,000
Applied Technology Education	20,084,200	24,391,900	20,695,800	16,966,100	15,982,600
Total	\$109,837,000	\$123,626,300	\$145,945,600	\$153,088,800	\$151,857,900
Expenditures					
Personal Services	11,481,500	12,184,500	12,590,300	13,457,200	13,368,900
In-State Travel	285,900	309,400	261,100	261,100	261,100
Out of State Travel	147,200	146,700	161,200	161,200	161,200
Current Expense	5,233,600	5,474,100	6,438,900	6,909,700	6,677,100
DP Current Expense	1,256,700	1,218,000	887,400	877,900	877,900
DP Capital Outlay	27,600	45,300	329,600	593,600	593,600
Other Charges/Pass Thru	91,404,500	104,248,300	125,277,100	130,828,100	129,918,100
Total	\$109,837,000	\$123,626,300	\$145,945,600	\$153,088,800	\$151,857,900
FTE/Other					
Total FTE	205	206	206	212	212

4.3 Federal Funds State Office of Education

Programs	FY 1998 Actual	FY 1999 Actual	FY 2000 Actual	FY 2001 Estimated	FY 2002 Analyst
Instructional Services					
Aids Education	\$270,700	\$210,100	\$215,800	\$215,800	\$215,800
Bilingual Education	109,700	99,000	102,700	102,700	102,700
Reading Excellence			83,100	83,100	83,100
Low Income Children Program	34,781,300	29,911,100	38,068,500	31,184,500	31,184,500
Migrant Education	1,185,300	1,403,300	1,389,400	1,571,300	1,571,300
Tech Literacy			2,324,100	2,324,100	2,324,100
Neglected and Delinquent Prog.	316,200	591,400	654,900	460,600	460,600
Comp. Sch. Re			646,200	1,223,000	1,223,000
Title I Even			536,600	697,500	697,500
Program Improvement	39,800				
Utah Grant for Deaf and Blind	106,400	132,000	132,000	132,000	132,000
IDEA	23,022,400	31,946,100	37,389,100	42,832,400	42,832,400
Title VI	2,606,500	2,948,100	2,937,800	3,228,900	3,228,900
Immigrant Education Program	831,200	1,445,800	1,884,100	2,732,300	2,732,300
Title II Math	1,944,100	1,636,700	1,931,600	1,878,100	1,878,100
Vis. Imp. & Blind Sch. Incentive	3,118,800	3,544,100	3,909,000	3,647,900	3,647,900
IDEA St. Imp.			45,800	45,800	45,800
Drug Free Schools	107,300	119,000	78,200	2,140,000	2,140,000
Teach. Quality			347,300	1,727,600	1,727,600
Homeless Children Education	86,800	90,900	132,000	100,700	100,700
Cap. Exp. PV. S.			26,200	7,600	7,600
Public Education Misc. Grants	2,298,000	2,056,800	194,300	940,700	897,700
Class Size Reduction Grant			7,691,600	8,248,900	8,248,900
Refuge School Improvement			59,800	250,000	250,000
Subtotal Instructional Services	\$70,824,500	\$76,134,400	\$100,780,100	\$105,775,500	\$105,732,500
Applied Technology Education					
Adult Education Act					
IDEA	\$23,900	\$28,100	\$42,500	\$43,000	\$43,000
Vocational Ed. Basic Grant	10,323,200	11,995,200	11,897,800	11,252,100	11,252,100
Title IV	135,500	146,600	150,800	146,300	146,300
School to Work			2,181,000	1,835,000	910,000
Drug Free Schools	2,108,000	3,125,000	2,346,400		
Voc. Ed. Tech.			1,319,700	1,248,400	1,248,400
Public Education Misc. Grants	4,541,600	6,436,900			
Subtotal Applied Technology Ed.	\$17,132,200	\$21,731,800	\$17,938,200	\$14,524,800	\$13,580,400
Agency Services					
Public Education Misc. Grants	\$10,900	\$6,900	\$11,100	\$15,000	\$15,000
Subtotal Agency Services	\$10,900	\$6,900	\$11,100	\$15,000	\$15,000
Planning and Project Services					
Adult Education Act	\$1,741,500	\$1,773,300	\$989,800	\$1,779,200	\$1,779,200
Goals 2000			3,716,900	3,135,300	3,135,300
Incarcerated			17,900	17,000	17,000
Public Chart.			412,100	1,000,000	1,000,000
Byrd Scholarship	256,900	316,400	327,600	385,500	385,500
Public Education Misc. Grants	1,076,500	3,500,500	705,200	700,000	700,000
Subtotal Planning and Project Ser.	\$3,074,900	\$5,590,200	\$6,169,500	\$7,017,000	\$7,011,800
GRAND TOTAL	\$91,042,500	\$103,463,300	\$124,898,900	\$127,332,300	\$126,339,700

APPENDIX A

Time Line for Implementation of Assessment and Accountability Legislation		
MONTH/ YEAR	TASK	COSTS
	FY 2000-2001	
July, 2000	<ul style="list-style-type: none"> Begin development of 10th Grade Basic Skills Competency Test (first statewide administration May 2002) Begin second year of contract for completion of secondary language arts tests and negotiate addition of performance tasks 	\$785,000 \$ 500,000
August, 2000	<ul style="list-style-type: none"> Complete standard setting process for elementary and secondary math and science CR1 series Begin development of secondary language arts performance tasks 	\$250,000 \$500,000
September 2000	<ul style="list-style-type: none"> Begin preparation for implementation of direct writing assessment (e.g., determine whether to contract the process or do it internally, form a steering committee to oversee process) Begin development of new secondary math core curriculum and CRTs with performance tasks (operational May 2003) 	\$20,000 \$500,000
October, 2000	<ul style="list-style-type: none"> Reprint revised elementary and secondary science and elementary language arts tests. Administer and score Stanford Achievement Test 	\$150,000 240,000
December, 2000	<ul style="list-style-type: none"> Select and prepare prompts for pilot of direct writing assessment Report Stanford Achievement Test results to the State Board, including lexile scores at all grade levels Submit draft of Board Rule on maintenance of test data to State Board of first reading 	\$20,000
January, 2001	<ul style="list-style-type: none"> Begin development of elementary math core curriculum and CRTs with performance tasks (first statewide administration may 2004) 	\$500,000
May, 2001	<ul style="list-style-type: none"> Conduct first statewide administration of Core Assessment to be reported, including: <ul style="list-style-type: none"> revised elementary language arts, elementary and secondary science, and elementary and secondary math tests with application of the standard setting process, first operational administration of new multiple choice secondary language arts tests, pilot administration of secondary language arts performance tasks, and pilot of 10th grade Basic Skills Competency test Establish tentative cut scores for 10th grade competency test and generate impact data 	\$ 275,000 (\$100,000 CPU time, \$85,000 Ans. Documents, \$60,000 print support materials, \$10,000 handling & dist., \$20,000, training \$ 100,000
	<ul style="list-style-type: none"> Train scorers and score direct writing assessment pilot 	\$ 200,000
TOTAL COSTS	(To date, the legislature has provided 4,150,000 in ongoing funds)	Total \$4,040,000 Current \$4,150,000 Needed None

MONTH/ YEAR	TASK	COSTS
	FY 2001-2002	
July, 2001	<ul style="list-style-type: none"> Continue development of new math CRTs and performance tasks (operational May 2003/2004) Begin development of new elementary science CRTs (operational May 2003) Begin second full year development of 10th grade basic skills competency tests 	\$900,000 \$400,000 \$1,300,000
August, 2001	<ul style="list-style-type: none"> Complete secondary language arts standard setting. 	\$100,000
September, 2001	<ul style="list-style-type: none"> Administration of Stanford Achievement Test 	\$245,000
December, 2001	<ul style="list-style-type: none"> Prepare direct writing assessment prompts for first statewide administration 	\$25,000
January, 2002	<ul style="list-style-type: none"> Begin development of secondary science CRTs (operational May 2004) 	\$500,000
April, 2002	<ul style="list-style-type: none"> Conduct statewide administration of the direct writing assessment at grades 6 and 9 	\$ 10,000
May 2002	<ul style="list-style-type: none"> Conduct statewide administration of Core Assessment, including: <ul style="list-style-type: none"> revised elementary language arts, elementary and secondary science, and elementary and secondary math tests with application of the standard setting process, new multiple choice secondary language arts tests with application of the standard setting process, first statewide administration of secondary language arts performance tasks pilot of secondary math tests and performance tasks, pilot of elementary science tests, and first statewide administration of 10th grade Basic Skills Competency test with penalty applied Establish cut scores for 10th grade basic skills competency test 	\$ 290,000 (breakdown same as previous year with 5% per year increase) \$100,000
June, 2002	<ul style="list-style-type: none"> Train scorers and score direct writing assessments and constructed response tasks 	\$1,400,000 (\$1,100,000 for scoring, \$300,000 for training, etc.)
	<ul style="list-style-type: none"> Provide inservice training to teachers and administrators Produce support materials (e.g., pamphlets, videos, presentations) to inform the public about accountability Produce materials to inform the public, teachers, students, and parents about the 10th Grade Basic Skills Competency Test and the associated educational consequences 	\$1,000,000
	<ul style="list-style-type: none"> Provide staff for districts to coordinate data needs and support schools Provide and maintain the necessary hardware, software, and licensing for districts to comply with state database requirements. 	\$1,200,000 \$650,000
TOTAL COSTS	(The figure in the "current" column reflects the addition of the previous year's building block)	Total \$8,120,000 Current \$4,150,000 Needed \$3,970,000

MONTH/ YEAR	TASK	COSTS
	FY 2002-2003	
July, 2002	<ul style="list-style-type: none"> • Begin development of new elementary language arts CRTs and performance tasks (operational May 2004) • Begin third year development of math CRTs and performance tasks (operational May 2003/2004) • Begin second year development of science CRTs (operational May 2003/2004) • •Ongoing 10th Grade Basic Skills Competency Test development 	\$800,000 \$1,500,000 \$900,000 \$1,350,000
August, 2002	<ul style="list-style-type: none"> • Complete standard setting on secondary language arts tests with performance tasks 	\$ 60,000
September, 2002	<ul style="list-style-type: none"> • Administration of the Stanford Achievement Test 	\$ 245,000
December, 2002	<ul style="list-style-type: none"> • Prepare direct writing assessment prompts 	\$ 25,000
January, 2003	<ul style="list-style-type: none"> • Begin development of new secondary language arts CRTs and Performance tasks (operational May 2005) 	\$ 800,000
April, 2003	<ul style="list-style-type: none"> • Conduct statewide administration of the direct writing assessment at grades 6 and 9 	\$ 10,000
May 2003	<ul style="list-style-type: none"> • Conduct statewide administration of Core Assessment, including: <ul style="list-style-type: none"> – revised elementary language arts, elementary and secondary science, and elementary and secondary math tests with application of the standard setting process, – first statewide administration of secondary math tests and performance tasks, and elementary science tests – new multiple choice secondary language arts tests and performance tasks with application of the standard setting process – pilot administration of new elementary math and language arts tests and performance tasks, and secondary science tests – first statewide administration of 10th grade Basic Skills Competency test with penalty applied (e.g., students who will graduate in 2005 must pass the tests to receive a diploma) 	\$305,000 (breakdown same as first year with 5% per year increase)
June, 2003	<ul style="list-style-type: none"> • Train scorers and score direct writing assessments and constructed response tasks 	\$2,700,000 (\$2,200,000 for scoring, \$500,000 for training, etc.)
	<ul style="list-style-type: none"> • Provide inservice training to teachers and administrators • Produce support materials (e.g., pamphlets, videos, presentations) to inform the public about accountability • Produce materials to inform the public, teachers, students, and parents about the 10th Grade Basic Skills Competency Test and the associated educational consequences 	\$1,000,000
	<ul style="list-style-type: none"> • Provide staff for districts to coordinate data needs and support schools • Provide the necessary hardware, software, and licensing for districts to comply with state database requirements.. 	\$1,260,000 (reflects 5% per year increase) \$650,000
TOTAL COSTS	(The figure in the “current” column reflects the addition of the previous year’s building block)	Total \$11,605,000 Current \$8,120,000 Needed \$3,485,000

MONTH/ YEAR	TASK	COSTS
	FY 2003-2004	
July, 2003	<ul style="list-style-type: none"> Begin second year development of new language arts CRTs and performance tasks (operational may 2004/2005) Begin third year of development of elementary math CRTs and performance tasks (operational may 2004) Begin third year development of secondary science CRTs (operational May 2004) Ongoing 10th Grade Basic Skills Competency Test development 	\$1,500,000 \$800,000 \$400,000 \$1,400,000
August, 2003	<ul style="list-style-type: none"> Complete standard setting on secondary math tests and performance task, and elementary science 	\$200,000
September 2003	<ul style="list-style-type: none"> Administration of the Stanford Achievement Test 	\$245,000
December, 2003	<ul style="list-style-type: none"> Prepare direct writing assessment prompts 	\$25,000
April, 2004	Conduct statewide administration of the direct writing assessment at grades 6 and 9	\$10,000
May, 2004	<ul style="list-style-type: none"> Conduct first statewide administration of Core Assessment, including: <ul style="list-style-type: none"> secondary language arts tests and performance tasks with standards, first statewide administration of new secondary math tests and performance tasks, and elementary science tests with standards, first statewide administration of elementary math and language arts tests and performance tasks, and secondary science tests Pilot of new secondary language arts tests and performance tasks, and Statewide administration of 19th grade Basic Skills Competency test with penalty applied (e.g., students who will graduate in 2006 must pass the tests to receive a diploma) 	\$ 320,000 (breakdown same as first year with 5% per year increase)
June 2004	<ul style="list-style-type: none"> Train scorers and score direct writing assessments and constructed response tasks 	\$ 4,440,000 (\$3,740,000 for scoring, \$700,000 for training, etc.)
	<ul style="list-style-type: none"> Provide inservice training to teachers and administrators Produce support materials (e.g., pamphlets, videos, presentations) to inform the public about accountability Produce materials to inform the public, teachers, students, and parents about the 10th Grade Basic Skills Competency Test and the associated educational consequences 	\$1,000,000
	<ul style="list-style-type: none"> Provide staff for districts to coordinate data needs and support schools Provide the necessary hardware, software, and licensing for districts to comply with state database requirements 	\$ 1,323,000 (reflects 5% per year increase) \$650,000
TOTAL COSTS	(The figure in the “current” column reflects the addition of the previous year’s building block)	Total \$12,313,000 Current \$11,605,000 Needed \$708,000

MONTH/ YEAR	TASK	COSTS
	FY 2004-2005	
July, 2004	<ul style="list-style-type: none"> Ongoing development of new 10th grade basic skills competency 	\$1,440,000
	Begin third year development of new secondary language arts CRTs and performance tasks (operational May 2005)	\$800,000
August, 2004	<ul style="list-style-type: none"> Complete standard setting on elementary math and language arts tests and performance tasks, and secondary science tests 	\$300,000
September 2004	<ul style="list-style-type: none"> Purchase and administration of the new NRT 	\$800,000
December, 2004	<ul style="list-style-type: none"> Prepare direct writing assessment prompts 	\$25,000
April, 2004	Conduct statewide administration of the direct writing assessment at grades 6 and 9	\$10,000
May, 2005	<ul style="list-style-type: none"> Conduct statewide administration of Core Assessment, including: <ul style="list-style-type: none"> secondary math tests and performance tasks, and elementary science tests with standards first statewide administration of elementary math and language arts tests and performance tasks, and secondary science with standards, first statewide administration of new secondary language arts tests and performance tasks, and Statewide administration of 19th grade Basic Skills Competency test with penalty applied (e.g., students who will graduate in 2006 must pass the tests to receive a diploma) 	\$ 340,000 (breakdown same as first year with 5% per year increase)
June 2005	<ul style="list-style-type: none"> Train scorers and score direct writing assessments and constructed response tasks 	\$5,620,000 (\$4,620,000 for scoring, \$1,000,000 for training, etc.)
	<ul style="list-style-type: none"> Provide inservice training to teachers and administrators Produce support materials (e.g., pamphlets, videos, presentations) to inform the public about accountability Produce materials to inform the public, teachers, students, and parents about the 10th Grade Basic Skills Competency Test and the associated educational consequences 	\$1,000,000
	<ul style="list-style-type: none"> Provide staff for districts to coordinate data needs and support schools Provide the necessary hardware, software, and licensing for districts to comply with state database requirements 	\$ 1,389,150 (reflects 5% per year increase) \$650,000
TOTAL COSTS	(The figure in the “current” column reflects the addition of the previous year’s building block)	Total \$12,374,150 Current \$12,313,000 Needed \$61,150